Using a Project Gateway Repository

Overview

Projects that are published in a Project Gateway Repository will be automatically reported to the assigned observatory. This reporting will be scheduled either daily or weekly.

The project leader does not need to take any special action to create observatory reports. This section explains what repository data is transmitted and how it can be managed by the project leader to be most useful.

Observatory Project Reports get their information from the following places.

The Project Profile Document

The Most Recently Created Project Status Report Documents

The Project Issue Documents

Assignments marked as key events

Project Documents with Document Tracking Codes

All Project Documents

All assignment documents in the project

Costing Center

Information from the Project Profile

The "Don't show on dashboard flag" is used to determine if the project should be sent to the observatory. If this flag is set, then no report is sent.

The "Marked done" flag is used to determine if the project is finished. If this flag is set, the project is reported as finished, otherwise it is reported as "Approved"

From the project profile document, the system reports:

Project Name

Project Description (limited to first 30K characters, formatting removed)

Repository Program Name

Manager Email Address

Target Values for Time, Effort

Latest End Date and other statistics gathered by the dashboard agents.

Total Cost at Completion (from value supplied by Project Planning software). This is an optional parameter.

The system also sends a hyperlink to the Project Profile which will be shown in the Documents section of the Observatory Project Report.

Information from Project Status Reports

Each time an observatory report is prepared, the system locates the most recent project status report available for that project. From this report it extracts the "Summary" keywords (On Schedule, Slipping, etc.), the author name, and the body of the written report. The report body is truncated to a maximum of 4 lines for transmittal.

This information will end up in the "Current Status" section of the observatory Project Report.

Information from Project Issues Documents

Each time an observatory report is prepared, the system locates the issues documents associated with the project. The first 25 open issues are selected for transmittal. For each issue, the system reports the issue title, due date, and truncates the issue description into a maximum of 4 lines.

This information will end up in the "Current Issues" section of the observatory Project Report and in the Issues Report.

Information from Assignments marked as Key Events

Each time an observatory report is prepared, the system locates all the key events associated with the project. For each, it transmits the taskname, start date, finish date, actual date if any and percent complete.

The observatory records the entire list for use in InterProject Dependencies and for display in the Milestone Report. The observatory selects a maximum of 10 "interesting" key events for display in the Current Events section of the observatory Project Report. These events are selected for display using the following rules:

First Priority is given to overdue events.

Next Priority is given to the most recently completed event.

Next Priority is given to unfinished events (in ascending date order)

Finally, if there is room, additional completed events are included in reverse date order (so that the more recent ones are shown).

Information from Project Documents and Assignments using Document Tracking Codes.

Each time an observatory report is prepared, the system counts all the unique document tracking codes used on assignments in the project. Both the "Creates" and "Requires" lists are used to compile this list.

Next, the system finds all Project Documents associated with the project and adds any document tracking codes used to the same list. The length of this list of document tracking codes, compiled from the assignments and the project documents is called the "Outputs Expected" Count.

For each COMPLETED Project Document that has one of these document tracking codes defined, the system counts it as an "Output Completed"

Both Outputs Expected and Outputs Completed are reported to the observatory and displayed in the Statistics section of the observatory Project Report.

Direct Links to All Project Documents

The system sends a link to each project document These links will be displayed in the Documents section of the Observatory Project Report. The hyperlinks are constructed using the URL of the Repository (from the Field Map document).

Information from all Project Assignments

The project assignments are used to tabulate the planned, actual and reference work by week, and to count planned, actual, and reference assignment starts and finishes by week.

The data from these assignments will be reported at a level of detail chosen by the Repository Administrator. This mode of reporting applies to all projects in the repository.

Mode 1 - Resource Reporting. Project commitment reports will be created for each person assigned to the project.

Mode 2 - Organization Reporting. Project commitment reports will be created for each organization whose resources are assigned to the project. The resource totals will be combined to create the organization totals for weekly work, task starts, etc.

Mode 3 - Organization Reporting - Top 2 Levels Only. Similar to mode 3, except that only the top two levels of the organization hierarchy will be used. Lower level organizations and their resources will be aggregated into the higher level groups.

Mode 4 - Organization Reporting - Top Level Only. Similar to mode 3, except that only the top level organization will be used. Lower level organizations and their resources will be aggregated into the higher level groups.

Mode 5 - Project Level Reporting. Report project totals only. All resource data will be combined into a single project commitment report.

Information from Costing Center

If a costing center database is defined for this repository, and if this project has an actual cost reported in the costing center, then the actual cost will be transmitted to the observatory.

If a target cost is defined in the costing center, then this will be transmitted as the target cost for the project.

Practical Consideration for the Project Leader

The project leader should:

1. Prepare an updated Project Status Report each week and make the first paragraph of the report summarizes the whole.

2. Review Project Issues weekly and close out those which are no longer important. Make issue titles self explanatory. Make due dates reasonable.

3. Set realistic targets for time and effort for each project.

4. Ensure that resources are updating their assignments and/or submitting their timesheets on a timely basis so that the data is current.

5. Update the project schedules and reference plan whenever a formal plan change is approved.

6. Design projects with frequent key events. Make sure the key event names are self explanatory when seen in isolation.

7. Choose a project name is that is meaningful.

8. Ensure that the project profile contains the project leaders Email address. This should be provided so that the observatory will have a place to send important notifications.

Differences between Observatory and Repository data

The observatory has only three states for progress (good, fair, poor) whereas the repository has a fourth (bomb) state.

The observatory interprets overdue work somewhat differently from the method used in the repository. Thus, the overdue work totals will be different.

The observatory allows the user to define project targets for time, effort, and cost that are different from those used in the repository. However, in the absence of such manual override, the target values used in the repository for time and effort will be used in the observatory.

The observatory and repository dashboards are updated on different time cycles. As a result, numeric totals will frequently show small differences.